TOPIC 6: POSITION CONTROL INQUIRIES AND REPORTS

The design of this topic is to familiarize each employee with the use of Position Control Inquiries. Inquiries are online management reports that allow for easy viewing of essential information related to a position. Inquiries also provide you with access to reporting information stored in the database. Most inquiry codes within SAM II HR/Payroll start with the letter "Q".

At the end of this topic, you will be able to:

- Describe how each Position Control Inquiry will be used in the system
- Verify position information entered on an employee
- View and access Position Control inquiries

POSITION CONTROL PROCESS CHART

Step 1: REFERENCE TABLES

Title (TITL)	Sub-Title (STTL)
Civil Service Status (CIVS)	Pay Class (PYCL)

Step 3: MAINTAINING POSITIONS

Maintain Position Info (PSMT)	Reallocate a Position (PSMT)
Hold a Position (PSMT)	Restrict a Position (PSMT)
Inactivate a Position (PSMT/PAMT)	Change Incumbents or FTEs (PAMT)

Change Overfill Capacity (PAMT)

Step 2: ESTABLISHING POSITIONS

Complete the Position Status Maintenance (PSMT)

↓

Complete the Position Authorization (PAMT)

↓

Complete the Position User Defined Windows (PUD1, PUD2, PUD3) as required

Step 4: POSITION CONTROL INQUIRIES

Position Folder (QPSTF)	Position by Title Inquiry (QPTL)
Position Roster (QPSR)	Title Categories for Title (QTCT)
Position Status Inquiry (QPST)	Position Authorization Inquiry (QPAT)

POSITION CONTROL INQUIRIES

Like other areas of the SAM II system, Position Control has several special purpose windows that function solely as inquiries. (Inquiry windows are used to display information only.) These inquiries can be used by management to look up specific information regarding Position Control. Some of these inquiries contain cross-reference information taken from several tables, which allows you to see highlights or information pertaining to a specific topic without having to open additional windows.

Remember that inquiries are available on-line in the system and are updated after a transaction has been processed. Usually, this update process occurs immediately. Let's review some common inquiries related to Position Control.

POSITION AUTHORIZATION INQUIRY (QPAT) – Displays the total number of incumbents and full-time equivalents (FTEs) authorized for a fiscal year as well as the number that are filled and vacant. The inquiry can include fiscal year totals for the entire agency or for a specific organization within the agency.

POSITION ROSTER (QPSR) – Displays a detailed history of past and current incumbents of a position, including employee ID, appointment ID, Effective and Expiration Dates, Status, Title and Sub-title. The inquiry can include incumbents who are currently active in a position or a history of incumbents in a position during a specified period of time.

POSITION STATUS INQUIRY (QPST) – Displays a detailed listing of position statuses (e.g., ACTVA, HOLD, INACT, etc.). The inquiry can include a listing of all types of position statuses, or a specific type of position status, during a specified period of time.

POSITION FOLDER (QPSTF) – Provides a quick reference for looking up position information. From this inquiry, a folder containing a consolidated list of position control windows can be accessed and opened to review information related to the position.

POSITION CONTROL PROCESS CHART

Step 1: REFERENCE TABLES

Title (TITL)

Sub-Title (STTL)

Civil Service Status (CIVS)

Pay Class (PYCL)

Step 3: MAINTAINING POSITIONS

Maintain Position Info (PSMT)

Reallocate a Position (PSMT)

Hold a Position (PSMT)

Restrict a Position (PSMT)

Inactivate a Position (PSMT/PAMT)

Change Incumbents or FTEs (PAMT)

Change Overfill Capacity (PAMT)

Step 2: ESTABLISHING POSITIONS

Complete the Position Status Maintenance (PSMT)

↓

Complete the Position Authorization (PAMT)

↓

Complete the Position User Defined Windows (PUD1, PUD2, PUD3) as required

Step 4: POSITION CONTROL INQUIRIES

Position Folder (QPSTF)

Position by Title Inquiry (QPTL)

Position Roster (QPSR)

Title Categories for Title (QTCT)

Position Status Inquiry (QPST)

Position Authorization Inquiry (QPAT)

POSITION CONTROL INQUIRIES

POSITIONS BY TITLE INQUIRY (QPTL) – Displays position information, including Title, Sub-title, Position Number, Short Description, Status, Authorized Incumbents and FTE, Filled Incumbents and FTE, and Overfill Authorization. The inquiry is sorted by title and can include all positions, or only positions that fit within selected parameters, as of a specified date.

TITLE CATEGORIES FOR TITLE (QTCT) – Displays all of the title categories that a title is included in.

POSITION AUTHORIZATION INQUIRY (QPAT)

Position Authorization Inquiry

Fiscal Year		Agency		Organization	
Authorized Incumbents			Authorized FTEs		
Filled Incumbents			Filled FTEs		
Pending Incumbents			Pending FTEs		
Future Incumbents			Future FTEs		
Vacant Incumbents			Vacant FTEs		

NOTES

POSITION AUTHORIZATION INQUIRY (QPAT)

The Position Authorization Inquiry (QPAT) window displays the total number of incumbents and full-time equivalents (FTEs) authorized for a fiscal year as well as the number that are filled and vacant. The inquiry can include fiscal year totals for the entire agency or for a specific organization within the agency.

Step 1 To open QPAT from the SAM II Desktop Navigator window, click on the Go To icon. Type QPAT in the "CODE". Click on the Open button.

Step 2 Populate the following field to narrow your search on the QPAT window.

FISCAL YEAR – Required. Enter the fiscal year for which incumbent and FTE totals are to be displayed. Type **01**.

AGENCY – Optional. Enter the code for the agency for which incumbent and FTE totals are to be displayed. Valid agency codes can be found on the Agency Index (AGCY) window. If this field is left blank, incumbent and FTE totals for all agencies will be displayed. Type **650**.

ORGANIZATION – Conditional. Enter the code for the organization for which incumbent and FTE totals are to be displayed. Valid organization codes can be found on the Organization Index (ORGN) window. If this field is left blank, incumbent and FTE totals for the entire agency will be displayed. Type **4115**
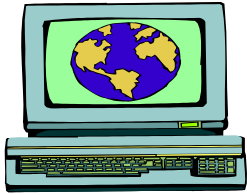
Select **Display: Browse Data**

Step 3 Let's review the remaining fields of the QPAT inquiry.

AUTH INCUMBENTS – Inferred. Displays the total number of authorized incumbents for the specified fiscal year, agency and organization.

AUTH FTEs – Inferred. Displays the total number of authorized full time equivalents (FTEs) for the specified fiscal year, agency and organization.

FILLED INCUMBENTS – Inferred. Displays the total number of filled incumbents for the specified fiscal year, agency and organization.

POSITION AUTHORIZATION INQUIRY (QPAT)

Position Authorization Inquiry		
Fiscal Year [ ]	Agency [ ]	Organization [ ]
Authorized Incumbents [ ]		Authorized FTEs [ ]
Filled Incumbents [ ]		Filled FTEs [ ]
Pending Incumbents [ ]		Pending FTEs [ ]
Future Incumbents [ ]		Future FTEs [ ]
Vacant Incumbents [ ]		Vacant FTEs [ ]

NOTES

POSITION AUTHORIZATION INQUIRY (QPAT)

Step 3 Let's continue to review the remaining fields of the QPAT inquiry.

FILLED FTEs – Inferred. Displays the total number of filled full time equivalents (FTEs) for the specified fiscal year, agency and organization.

PENDING INCUMBENTS – Inferred. Displays the total number of positions that are reserved for recruitment purposes for the fiscal year, agency and organization.

PENDING FTE - Inferred. Displays the total number of full time equivalents that are reserved for recruitment purposes for the fiscal year, agency and organization.
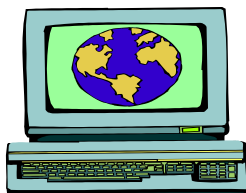
FUTURE INCUMBENTS - Inferred. Displays the total number of employees who will move into the position in the future for the fiscal year is displayed.

FUTURE FTE - Inferred. Displays the total number of full time equivelents who will move into the position in the future for the fiscal year is displayed.

VACANT INCUMBENTS – Inferred. Displays the total number of vacant incumbents for the specified fiscal year, agency and organization.

VACANT FTEs – Inferred. Displays the total number of vacant full time equivalent (FTEs) for the specified fiscal year, agency and organization.

Step 4 Close the QPAT window.

POSITION ROSTER INQUIRY (QPSR)

NOTES

POSITION ROSTER INQUIRY (QPSR)

The Position Roster (QPSR) window displays a detailed history of past and current incumbents of a position, including employee ID, appointment ID, Effective and Expiration Dates, Status, Title and Sub-Title. The inquiry can include incumbents who are currently active in a position or a history of incumbents in a position during a specified period of time.

Step 1 To open QPSR from the SAM II Desktop Navigator window, click on the Go To icon. Type QPSR in the "CODE". Click on the Open button.

Step 2 Populate the following field to narrow your search on the QPSR window.

> **AGENCY** – Required. Enter the code for the agency to which the position is assigned. Valid agency codes can be found on the Agency Index (AGCY) window. Type **650**.

> **ORGANIZATION** – Required. Enter the code for the organization to which the position is assigned. Valid agency codes can be found on the Organization Index (ORGN) window. Type **MI00**.

> **POSITION NUMBER** – Required. Enter the value assigned to the position. Valid values are located on the Position Status Inquiry (QPST) window. Type **EM22001**.

> Select **Display: Browse Data**

Step 3 Let's review the remaining fields of the QPSR inquiry.

> **EFFECTIVE DATE** – Inferred. Leave this field blank and it will default to the current date.

> **EXPIRATION DATE** – Inferred. This field displays the date that defines the end of the time period for which incumbent history is to be displayed. If this field is left blank, it will default to 99/99/99 and display incumbent history up to the current date.

POSITION ROSTER INQUIRY (QPSR)

NOTES

POSITION ROSTER INQUIRY (QPSR)

Step 3 Let's review the remaining fields of the QPSR inquiry.

SHORT DESCRIPTION – Inferred. Displays the short description of the position.

LONG DESCRIPTION – Inferred. Displays the long description of the position.

EMPLOYEE NAME -- Inferred. Displays the employee's full name (last name, first name and middle initial).

EMPLOYEE ID – Inferred. Displays the employee's social security number.

APPOINTMENT ID – Inferred. Displays the employee's appointment identification number.

EFFECTIVE DATE – Inferred. Displays the date (*mm/dd/yy*) the employee information became effective.

**EXPIRATION DATE** – Inferred. Displays the date (*mm/dd/yy*) the employee information expires.

STATUS – Inferred. Displays the employee's employment status code.

TITLE – Inferred. Displays the position's title code.

SUB-TITLE – Inferred. Displays the position's sub-title code.

% FULL-TIME – Required. The percent that the employee works full time in this position or title is displayed.

Step 4 Close the QPSR window.
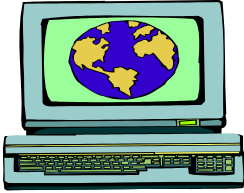
POSITION STATUS INQUIRY (QPST)

ADVANTAGE Desktop - OA70 - [Position Status Inquiry]								
File	Edit	Display	Window	Help				

Agency	650		Organization	4115		Position Status	ACTVA	
Effective Date	04 / 24 / 00		Expiration Date	/ 99 / 99				

	Position Status	Position Number	Short Description	Title	Sub-title	Budget Preparation	Effective Date	Expiration Date
1	ACTVA	MM32575	CMPINFTCTR	000150	T1		04 12 00	99 99 99
2	ACTVA	PCT0009	CMPINFTCTR	000150	T1		04 09 00	99 99 99
3	ACTVA	PC3KSW	KAREN'S POS	000150	T1		04 13 00	99 99 99
4	ACTVA	PC32001	CMPINFTCTR	000150	T1		04 18 00	99 99 99
5	ACTVA	PC32002	CMPINFTCTR	000150	T1		04 18 00	99 99 99
6	ACTVA	PC32003	CMPINFTCTR	000150	T1		04 18 00	99 99 99
7	ACTVA	PC32004	CMPINFTCTR	000150	T1		04 18 00	99 99 99
8	ACTVA	PC32005	CMPINFTCTR	000150	T1		04 18 00	99 99 99
9	ACTVA	PC41003	CMPINFTCTR	000150	T1		04 20 00	99 99 99

NOTES

POSITION STATUS INQUIRY (QPST)

The Position Status Inquiry (QPST) window displays a detailed listing of position statuses (e.g., ACTVA, HOLD, INACT, etc.). The inquiry can include a listing of all types of position statuses, or a specific type of position status, during a specified period of time.

Step 1 To open QPST from the SAM II Desktop Navigator window, click on the Go To icon. Type QPST in the "CODE". Click on the Open button.

Step 2 Populate the following field to narrow your search on the QPST window

AGENCY – Required. Enter the code for the agency to which the position is assigned. Valid agency codes can be found on the Agency Index (AGCY) window. Type **650**.
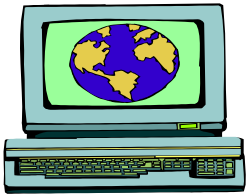
ORGANIZATION – Required. Enter the code for the organization to which the position is assigned. Valid agency codes can be found on the Organization Index (ORGN) window. Type **4115**.

POSITION STATUS – Optional. Leave this field blank to view a listing of all types of position statuses, or enter a position status code to view a listing of a specific type of position status. Valid position status codes can be found on the Position Status (PSTS) window. Type **ACTVA**.

EFFECTIVE DATE – Optional. To view only current position statuses, leave this field blank and it will default to the current date. To view position status actions for a specified period of time, enter the date that defines the beginning of the time period for which position status actions are to be displayed. Type **TODAY'S DATE**.

EXPIRATION DATE – Optional. Enter the date that defines the end of the time period for which position statuses are to be displayed. If this field is left blank, it will default to 99/99/99 and display incumbent history up to the current date.

Select **Display: Browse Data**

POSITION STATUS INQUIRY (QPST)

	Position Status	Position Number	Short Description	Title	Sub-title	Budget Preparation	Effective Date	Expiration Date
1	ACTVA	MM32575	CMPINFTCTR	000150	T1		04 12 00	99 99 99
2	ACTVA	PCT0009	CMPINFTCTR	000150	T1		04 09 00	99 99 99
3	ACTVA	PC3KSW	KAREN'S POS	000150	T1		04 13 00	99 99 99
4	ACTVA	PC32001	CMPINFTCTR	000150	T1		04 18 00	99 99 99
5	ACTVA	PC32002	CMPINFTCTR	000150	T1		04 18 00	99 99 99
6	ACTVA	PC32003	CMPINFTCTR	000150	T1		04 18 00	99 99 99
7	ACTVA	PC32004	CMPINFTCTR	000150	T1		04 18 00	99 99 99
8	ACTVA	PC32005	CMPINFTCTR	000150	T1		04 18 00	99 99 99
9	ACTVA	PC41003	CMPINFTCTR	000150	T1		04 20 00	99 99 99

Agency: 650 Organization: 4115 Position Status: ACTVA
Effective Date: 04 / 24 / 00 Expiration Date: / 99 / 99

NOTES

POSITION STATUS INQUIRY (QPST)

Step 3 Let's review the remaining fields of the QPST inquiry.

POSITION STATUS – Inferred. Displays the position status code.

POSITION NUMBER – Inferred. Displays the position number.

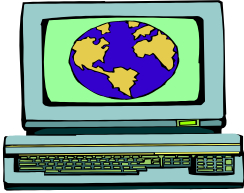**SHORT DESCRIPTION** – Inferred. Displays the short description of the position.

TITLE – Inferred. Displays the position's title code.

SUB-TITLE – Inferred. Displays the position's sub-title code.

BUDGET PREPARATION – Inferred. Displays the position's budget preparation code.

EFFECTIVE DATE – Inferred. Displays the date (*mm/dd/yy*) the position status information became effective.

EXPIRATION DATE – Inferred. Displays the date (*mm/dd/yy*) the position status information expires.

POSITION FOLDER INQUIRY (QPSTF)

	Position Status	Position Number	Short Description	Title	Sub-title	Budget Preparation	Effective Date	Expiration Date
1	ACTVA	MM32575	CMPINFTCTR	000150	T1		04 12 00	99 99 99
2	ACTVA	PCT0009	CMPINFTCTR	000150	T1		04 09 00	99 99 99
3	ACTVA	PC3KSW	KAREN'S POS	000150	T1		04 13 00	99 99 99
4	ACTVA	PC32001	CMPINFTCTR	000150	T1		04 18 00	99 99 99
5	ACTVA	PC32002	CMPINFTCTR	000150	T1		04 18 00	99 99 99
6	ACTVA	PC32003	CMPINFTCTR	000150	T1		04 18 00	99 99 99
7	ACTVA	PC32004	CMPINFTCTR	000150	T1		04 18 00	99 99 99
8	ACTVA	PC32005	CMPINFTCTR	000150	T1		04 18 00	99 99 99
9	ACTVA	PC41003	CMPINFTCTR	000150	T1		04 20 00	99 99 99

NOTES

POSITION FOLDER INQUIRY (QPSTF)

The Position Folder (QPSTF) window provides a quick reference for looking up position information. From this inquiry, a folder containing a consolidated list of Position Control windows can be accessed and opened to review information related to the position.

Step 1 To open QPSTF from the SAM II Desktop Navigator window, click on the Go To icon. Type QPSTF in the "CODE". Click on the Open button.

Step 2 Populate the following field to narrow your search on the QPSTF window

AGENCY – Required. Enter the code for the agency to which the position is assigned. Valid agency codes can be found on the Agency Index (AGCY) window. Type **650**.

ORGANIZATION – Required. Enter the code for the organization to which the position is assigned. Valid agency codes can be found on the Organization Index (ORGN) window. Type **4115**.

Select the **Browse** button at the bottom of the window.

Step 3 Let's review the remaining fields of the QPSTF inquiry.

POSITION STATUS – Optional. Leave this field blank to view a listing of all types of position statuses, or enter a position status code to view a listing of a specific type of position status. Valid position status codes can be found on the Position Status (PSTS) window.

EFFECTIVE DATE – Optional. To view only current position statuses, leave this field blank and it will default to the current date. To view position status actions for a specified period of time, enter the date that defines the beginning of the time period for which position status actions are to be displayed

EXPIRATION DATE – Optional. Enter the date that defines the end of the time period for which position statuses are to be displayed. If this field is left blank, it will default to 99/99/99 and display incumbent history up to the current date.
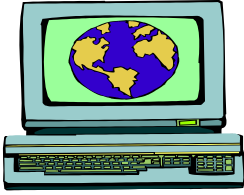
POSITION FOLDER INQUIRY (QPSTF)

ADVANTAGE Desktop - OA70 - [Position Status Inquiry]

File   Window   Help

Agency	650		Organization	4115		Position Status	
Effective Date	04 / 24 / 00		Expiration Date	99 / 99 / 99			

	Position Status	Position Number	Short Description	Title	Sub-title	Budget Preparation	Effective Date	Expiration Date
1	ACTVA	MM32575	CMPINFTCTR	000150	T1		04 12 00	99 99 99
2	ACTVA	PCT0009	CMPINFTCTR	000150	T1		04 09 00	99 99 99
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7	ACTVA	PC32004	CMPINFTCTR	000150	T1		04 18 00	99 99 99
8	ACTVA	PC32005	CMPINFTCTR	000150	T1		04 18 00	99 99 99
9	ACTVA	PC41003	CMPINFTCTR	000150	T1		04 20 00	99 99 99

Browse   More Data   Open   Cancel

Messages   4:18 PM   04/24/00

NOTES

POSITION FOLDER INQUIRY (QPSTF)

Step 3 Let's review the remaining fields of the QPSTF inquiry.

POSITION STATUS – Inferred. Displays the position status code.

POSITION NUMBER – Inferred. Displays the position number.

SHORT DESCRIPTION – Inferred. Displays the short description of the position.

TITLE – Inferred. Displays the position's title code.

SUB-TITLE – Inferred. Displays the position's sub-title code.

BUDGET PREPARATION – Inferred. Displays the position's budget preparation code.

EFFECTIVE DATE – Inferred. Displays the date (*mm/dd/yy*) the position status information became effective.

EXPIRATION DATE – Inferred. Displays the date (*mm/dd/yy*) the position status information expires.

Highlight the line of the desired position. Select the **OPEN** button to view a consolidated list of Position Control windows.

Highlight the desired Position Control window. Select the **OPEN** button to view the position information.

 Step 4 Close the QPSTF window.

Positions by Title Inquiry (QPTL)